Amazon Connect Help Desk Guide

L1 GUIDE

Missouri DHSS
Department of Health and Senior Services
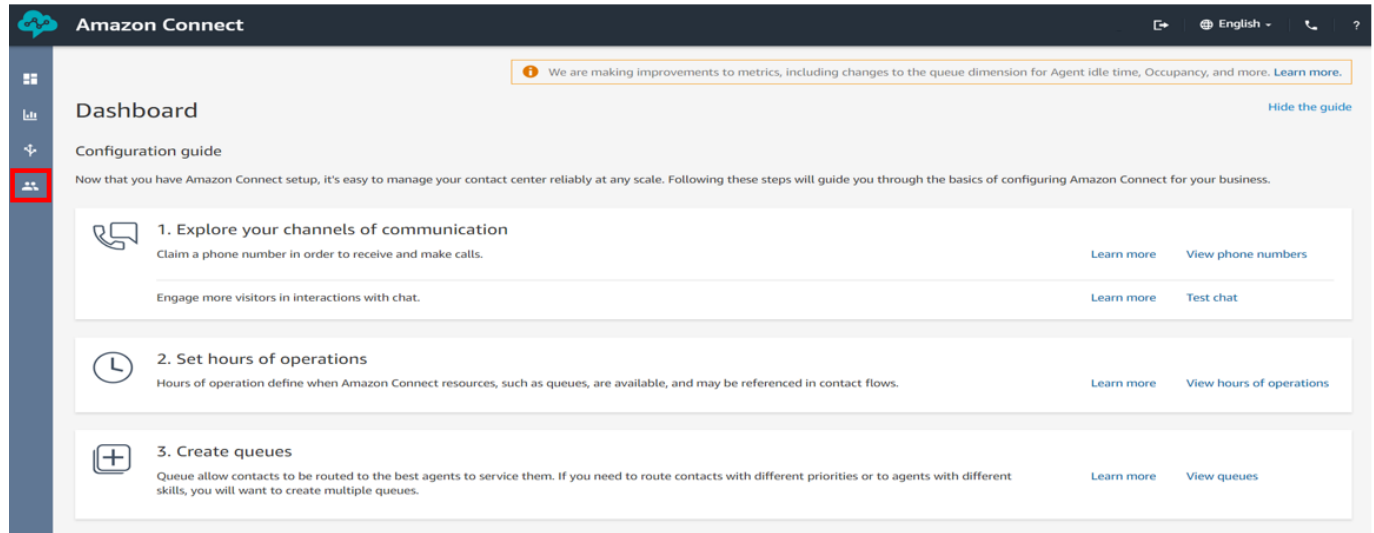
MO ACTS
Missouri's Advanced Contact Tracing System

Important Support Links and Trailheads

- Amazon Connect CTI Adapter v5 for Salesforce Lightning- Setup and Installation Guide:
  https://connect-blogs.s3.amazonaws.com/Amazon+Connect+Salesforce+CTI+Adapter/Amazon+Connect+CTI+Adapter+for+Salesforce+Lightning+-+Setup+and+Installation+Guide.pdf

- Amazon Connect- Administrator Guide:
  https://docs.aws.amazon.com/connect/latest/adminguide/connect-ag.pdf

- AWS Log In:
  https://moprodconnect.awsapps.com/connect/login
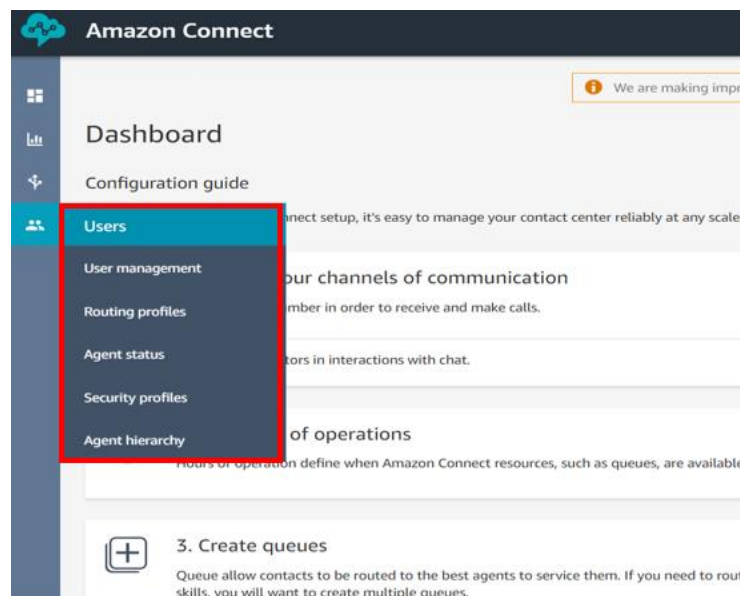
Navigating Amazon Connect

Navigate to Users

1. To access User Management please on the icon on the left hand panel.

Overview of Users Menu

Under the Users menu, there are several options related to user configuration. Below is a short description of what each of the menu options entail:

1. **Users Management** – provides the ability to add, edit, remove users. Additionally, you can modify a user's routing profile, security profile, agent hierarchy and phone preferences.
2. **Routing Profiles** – provides the ability to create routing profiles and assign multiple queues.
3. **Agent Status** – provides the ability to add, edit and remove statuses such as break, meeting, other, etc. (only Admins can access this functionality)
4. **Security Profiles** – provides the ability to edit user permissions for each security profile. (only Admins can access this functionality)
5. **Agent Hierarchy** – provides the ability to set up, edit and remove hierarchy for all agents. (i.e. Manager → Teams → Roles)

User Management

Options Overview

1. L1 Admins have the ability to Add, Remove and Modify users

Add Single User from Connect Console

1. Click on 'Add new users' from the top right hand corner of the User Management Dashboard
2. To add a single user, click on 'Create and set up a new user'
3. Select 'Next'

4. This will open the 'Add new user' page

5. Fill in the user details such as 'First Name', 'Last Name' and 'Email address'.
   Note: 'Email address' is not a 'Required' field but it should not be left blank. If this field is left blank users cannot reset their own passwords.

6. Fill in the 'Login name' as First name.Last name and set a randomly generated Password atleast 20 characters long

7. Assign the appropriate 'Routing Profiles' and 'Security Profiles'. More details on these fields can be found in the Appendix.

8. Under phone type default settings are 'Soft Phone', 'Auto Accept Call' Off and ACW timeout as 300.
   Note: This can change based on requirements

9. Once all user details are completed hit 'Save'.

10. This will take you to the 'Verify user details' page

11. Check the user configuration and 'Create users'

12. To share the user credentials use your MOACTS email address. CC in the MOACTS@health.mo.gov mailbox and use the standard email template (refer to the **Appendix**).

13. Using the login details the users will need to reset their own password (Refer to **Initial Amazon Connect User Setup** section of the document)
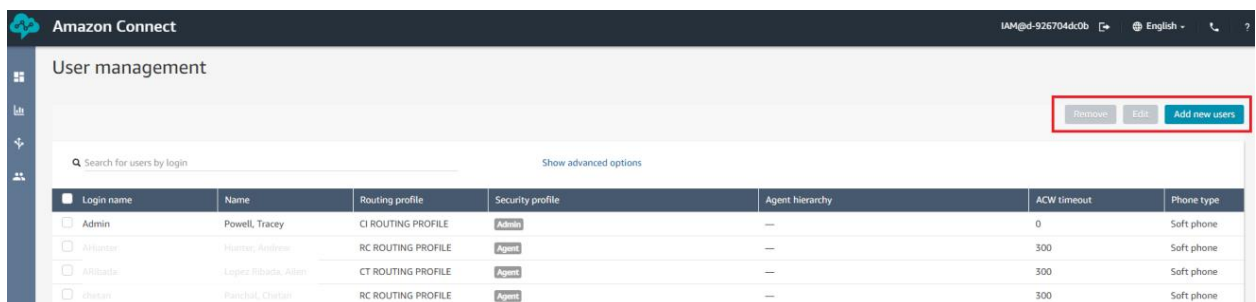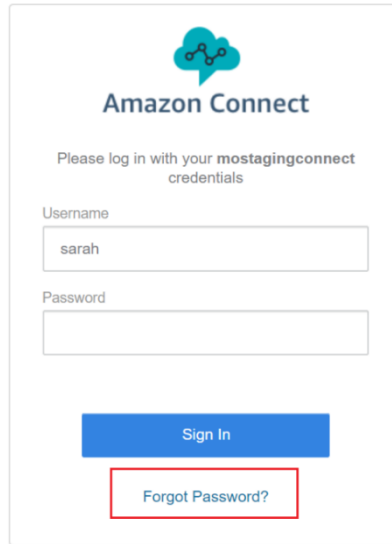
Add New Users – Bulk Upload

1. Fill in user details on the list of users excel file (template attached)

MO User Upload.xlsx

2. Ensure the users are added in the template format

3. Template Fields:
- First Name – This is a required field
- Last Name - This is a required field
- Email Address – Add appropriate email address. This is required in order to enable user based password reset
- User Login – This is a required field, should be Firstname.Lastname
- Password – This is a required field. Randomly generated password should be used
- Security Profile –Select from the list of Security Profiles on the excel. More details on permissions can be found on the Appendix.
- Routing Profile –Select from the list of Routing Profiles on the excel.
- Phone Type and Agent Hierarchy fields – Copy default fields from row 2 on template.

4. Log into your Connect Console

5. Go to User Management under Users Menu

6. Select 'Add new users'

7. Select 'Upload my users from a template' and hit Next

8. Choose the file you want to upload. Ensure the file is saved as a csv.
9. Click 'Upload and verify'
10. Check all the fields are added and no error messaged is received
11. If an error is detected you will get an error message and need to restart the process after fixing the file

12. If the file is accepted, review details and hit 'Create users'
13. To share the user credentials use your MOACTS email address. CC in the MOACTS@health.mo.gov mailbox and use the standard email template (refer to the **Appendix**).

14. Using the login details the users will need to reset their own password (Refer to **Initial Amazon Connect User Setup** section of the document)

Edit Users

1. Select a user from the User Management Dashboard
2. Click on Edit

3. From this menu you can modify several user details such as 'Routing Profile', 'Security Profiles' and 'Phone Type' details.

Reset Password
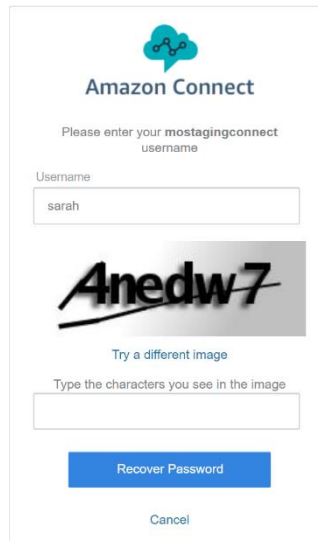

1. Users can reset their own password from the login URL by selecting 'Forgot Password?'

2. This will open a Captcha prompt to reset the password

Reset Password - Emergency

1. Select a user from the User Management Dashboard
2. Click on Edit Users

3. Click 'reset password' to set a **temporary** password.

4. Share temporary password with users through MOACTS email account. Password needs to be changed by users immediately in order to maintain security standards.

Remove Users

1. Select a user/multiple users by clicking on the checkbox on the left hand side.

2. Once a user has been selected the Remove and Edit buttons are enabled.

3. To remove a user press Remove

Advanced Filtering

1. Click the "Show Advanced Options" to search by login, routing profile, security profile or agent hierarchy.
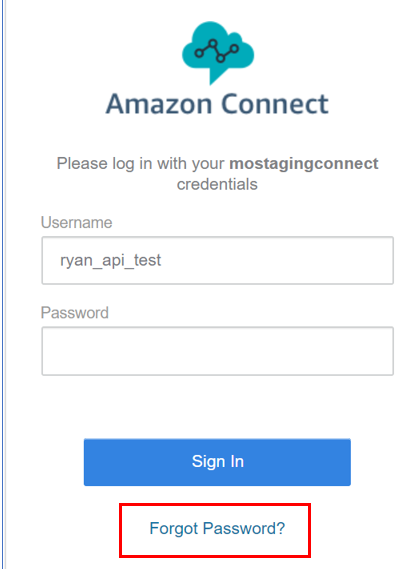
Initial Amazon Connect User Setup

Account Setup Email

1. When a new user is created, the user will receive an email with the Login URL and their Username.
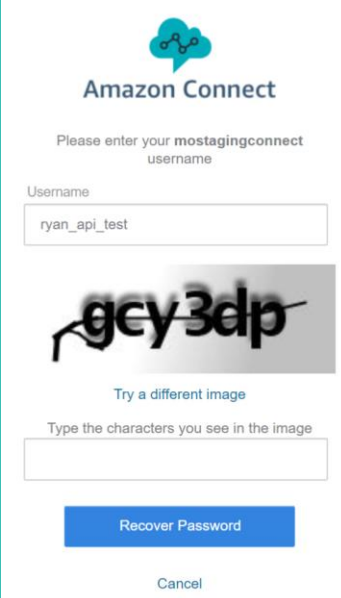2. In order to login, click on the URL

Login on Connect

1. On the landing page, type in the 'Username' and click on 'Forgot Password?'

2. Complete the security step and select 'Recover Password'.
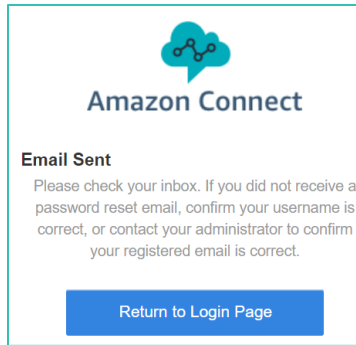
3. Select 'Return to Login Page'

4. Check inbox for a Reset Password Request email

[External] AWS Directory Service Reset Password Request

no-reply@mostagingconnect.awsapps.com
To ● Weidinger, Ryan

This message is from an EXTERNAL SENDER - be CAUTIOUS, particularly with links and attachments.

Dear User,

We have received a request to reset a user account associated with this email address. If you submitted this request, please visit the following URL to reset your password:

Reset Password

Your password will not be reset unless you confirm this email address using this URL. This link expires an hour after your original request.

If you did not request to reset this password, do not click this link. Instead, please forward this notification to aws-directoryservice@amazon.com to let us know that you did not request the password reset.

Thanks,
The AWS Directory Service Team

5. Click on Reset Password

6. Create a password that meets the password requirements and click on 'Reset Password'
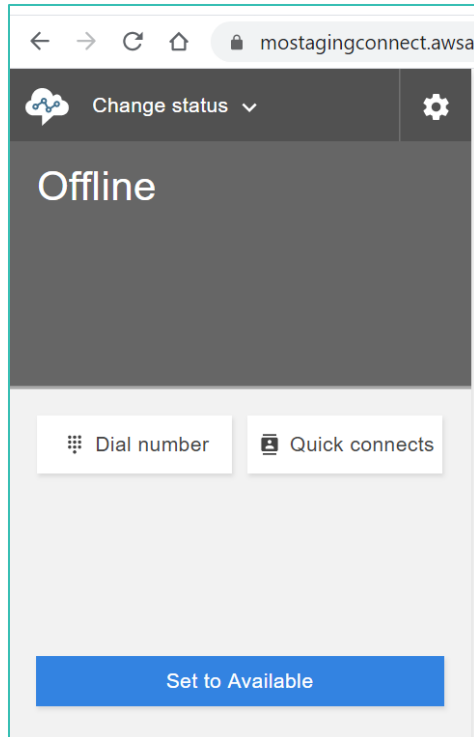
7. Agents should now be able to login and see a dial pad

Connect User Setup Troubleshooting

Email Not Received

1. Login to your Amazon Connect Account
2. Check if the user credentials have been created by searching the user on the Connect Portal.

    Note: Search the user by their first name or username.

3. To share the user credentials use your MOACTS email address. CC in the MOACTS@health.mo.gov mailbox and use the standard email template (refer to the **Appendix**).

Password Reset Failed

1. Login to your Amazon Connect Account
2. Check if the user credentials have been created by searching the user on the Connect Portal.

3. Click on Edit.
4. If Email Address field is empty, enter the users email address

4. Share the user credentials using your MOACTS email address. CC in the MOACTS@health.mo.gov mailbox and use the standard email template (refer to the **Appendix**).
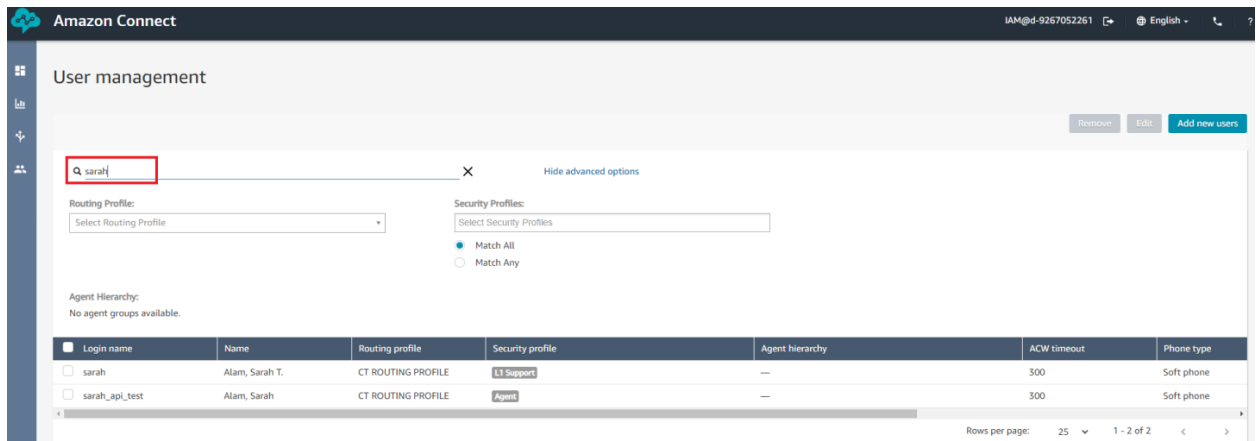   **Note:** If the user is created without an email address, sometimes adding in the email address does not resolve the password reset issue
5. Ensure the user is able to reset password. If not follow the steps below to reset their account

Reset Account

1. Ensure user that needs account reset is logged out
2. Login to your Amazon Connect Account
3. Search the user
4. Select and Remove the user (Follow the steps for 'Remove Users')
5. Click on 'Add new users' and fill in previous details for the user ensuring all essential fields such as name, username and email address are filled in
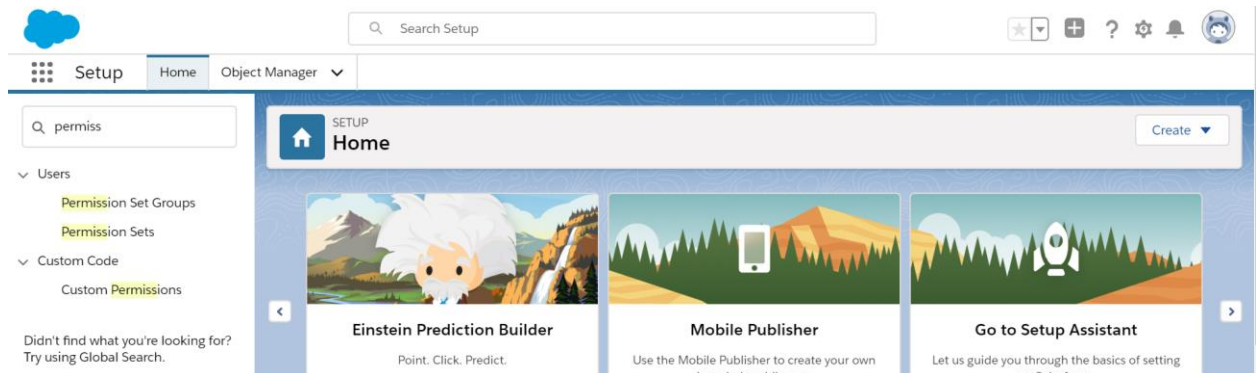
6. Click 'Save' and 'Create New Users' (Follow the steps for 'Add Single User from Connect Console')

7. **Note:** At this point you may get an error message if you use previous username. In that case, ensure the user is logged out and enough time has elapsed and try again.

8. To share the user credentials use your MOACTS email address. CC in the MOACTS@health.mo.gov mailbox and use the standard email template (refer to the **Appendix**).
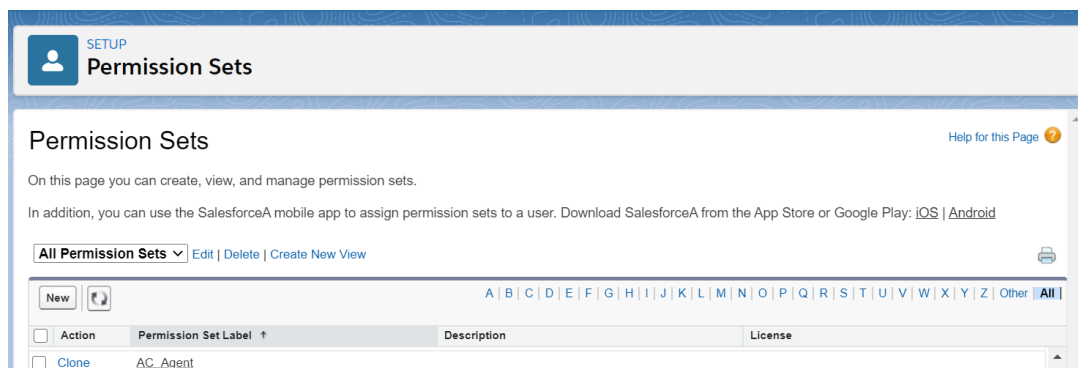
Salesforce CCP Troubleshooting

Permission Sets

9. Login to your Salesforce Environment

10. Go to your Salesforce Setup page using the ⚙

11. Under Quick Find type in Permission and select Permission Sets from the results

12. Choose the AC_Agent permission set

13. Choose Manage Assignments.

14. Choose Add Assignments.

15. Select the users to assign the permissions, then choose Assign.

Salesforce Call Center Users

1. On your Salesforce Setup page, type in Call Center
2. Select Call Centers. You may get prompted with a 'Say Hello to Salesforce Call Center' page, if so press 'Continue'

3. Click AC Lightning Adapter

4. Choose Manage Call Center Users in the Call Center Users section

5. On the AC Lightning Adapter: Manage Users page, select Add More Users.

6. Set filters (if desired) and then choose Find and Select the checkbox next to the user to add, then choose Add to Call Center.

Appendix
Security Profile Permissions

CallCenterManager Permissions	Supervisor	L1 Support	Agent	Admin
Routing - All permissions -Create, Edit, View Access to Routing Profiles, Quick Connects and Hours of Operation -Create, Edit, View, Enable/Disable Access for Queues	**Routing - View Access** -View, Edit, Create Access to Routing Profiles, Quick Connects, Hours of Operation, and Queues	**Routing - No Access**	**Routing - No Access**	**Routing - All Access**
Numbers and Flows - All permissions -All access (View, Edit, Create, Publish, Claim, Release) enabled for Prompts, Contact Flows, Phone Numbers, Chat test mode	**Numbers and Flows - View Access** -View enabled for Phone Numbers -View, Edit, Create Access for Prompts -View, Edit, Create, Publish Access for Contact Flows	**Numbers and Flows - No Access**	**Numbers and Flows - No Access**	**Numbers and Flows - All Access**
Users and permissions - Partial permissions -Create, View, Edit Users permission -Create, View, Edit, Enable Agent status permissions	**Users and permissions - View Access** -View, Edit, Create, Remove, and Edit Permission for Users -View, Edit, Create, and Enable/Disable Agent status	**Users and permissions - User Administration** -Create, View, Edit, Remove Users permission	**Users and permissions - No Access**	**Users and permissions -All Access**
CCP - No Access	**CCP - All Access** - Access CCP and make outbound calls	**CCP - All Access** - Access CCP and make outbound calls	**CCP - All Access** - Access CCP and make outbound calls	**CCP - All Access**
Metrics and Quality - Partial Permissions - Access metrics enabled -View Contact Search, Contact Attributes, Login/Logout Report -Enable/Disable Manager Monitor -Access, Delete, Download Recorded Conversations -View, Edit, Create, Delete, Publish and Schedule Saved Reports	**Metrics and Quality - Partial Permissions** - Access metrics enabled -View Contact Search, Contact Attributes, Search contacts by conversation characteristics and keywords, Contact Lens – speech analytics, Login/Logout Report -View, Edit, Create, and Delete Rules -Enable/Disable Manager Monitor -View, Edit, Create, Delete, Publish and Schedule Saved Reports	**Metrics and Quality - No Access**	**Metrics and Quality - No Access**	**Metrics and Quality - All Access**
Historic Changes - No Access	**Historic Changes - All Access** - View Historic Changes	**Historic Changes - No Access**	**Historic Changes - No Access**	**Historic Changes - All Access**

Routing Profiles

1. Case Investigator – Profile for people who will be reaching out to positive patients
2. Contact Tracers – Profile for people who will be reaching out to exposed contacts
3. Resource Coordinator – Profile for people who will be enabling resource coordination

MOACTS Email Template

Your MO ACTS
Amazon Connect Crec

Subject: Your MO ACTS Amazon Connect Credentials

Dear MO ACTS User,

We are pleased to share the information for your Amazon Connect account - the phone component of MO ACTS (Missouri Advanced Contact Tracing System). This is one of two credential emails you will receive for the production version MO ACTS. The other email will come from support@salesforce.com.

Once you receive the credentials email from support@salesforce.com you will be able to start the login process. Please reference the login guide and demo found on the MO ACTS Intranet site as you begin your login journey.

Below are key details you will need to reference while logging into Amazon Connect for the first time:

Login URL: https://moprodconnect.awsapps.com/connect/login

User ID (case sensitive):

In good health,

The MO ACTS team